



# **PAUSE, PIVOT, PURSUE: REALIGNING YOUR DEVELOPMENT AND COMMUNICATIONS STRATEGY**

Presented by:

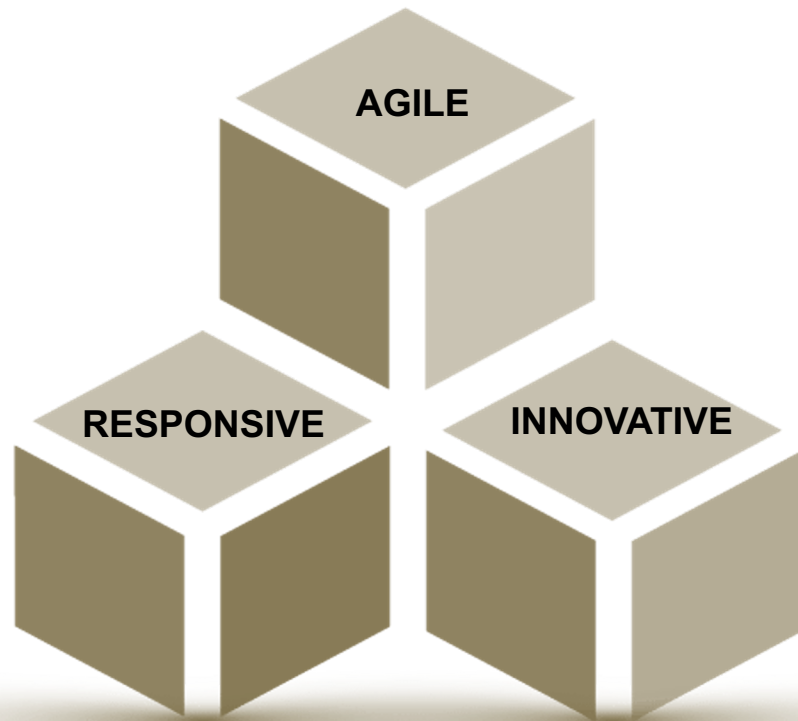
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April 29, 2020

# About Us

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- 41 years of service to the philanthropic community
- Full-service philanthropy consulting firm
- ExSearch – Executive Search Services
- Served more than 1,250 501(c)(3)s in all various sectors
- Part of the Collegium Family
- Since 1979, privileged to work with Catholic educational institutions, dioceses, parishes, and religious orders located throughout the United States.
- A diverse group of 15 consultants
- Member of The Giving Institute, the hallmark of ethical fundraising

# Our Focus

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Are you asking yourself:

*What's going to happen to our campaign?*

*How can we rethink upcoming appeals?*

*How soon can we solicit cultivated donors?*

*How do we cover budget gaps from postponed events?*

*When, how, and what do we tell our constituents?*



Minimizing the challenging impact of recent weeks and planning for the months ahead, we will offer essential strategies and takeaway tactics to guide your schools through these uncharted waters.

# When Disaster Strikes – Self-Imposed Litmus Test

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## December 2019

Institutions with strong relationships suffer least.

An institution may need to adjust short-term timetable (e.g. 3-4 weeks).

Most charities do not see long-term impact.

Fundraising efforts should not be stopped nor put on hold.

## April 2020

Institutions with strong relationships suffer least:

- You will find out exactly the relationship you have with constituents.
- Don't sit back – you want to hear from them and vice versa.
- We want to be in relationship with them.
- During this time of strife, we can change the dynamic between our constituents and our institutions.

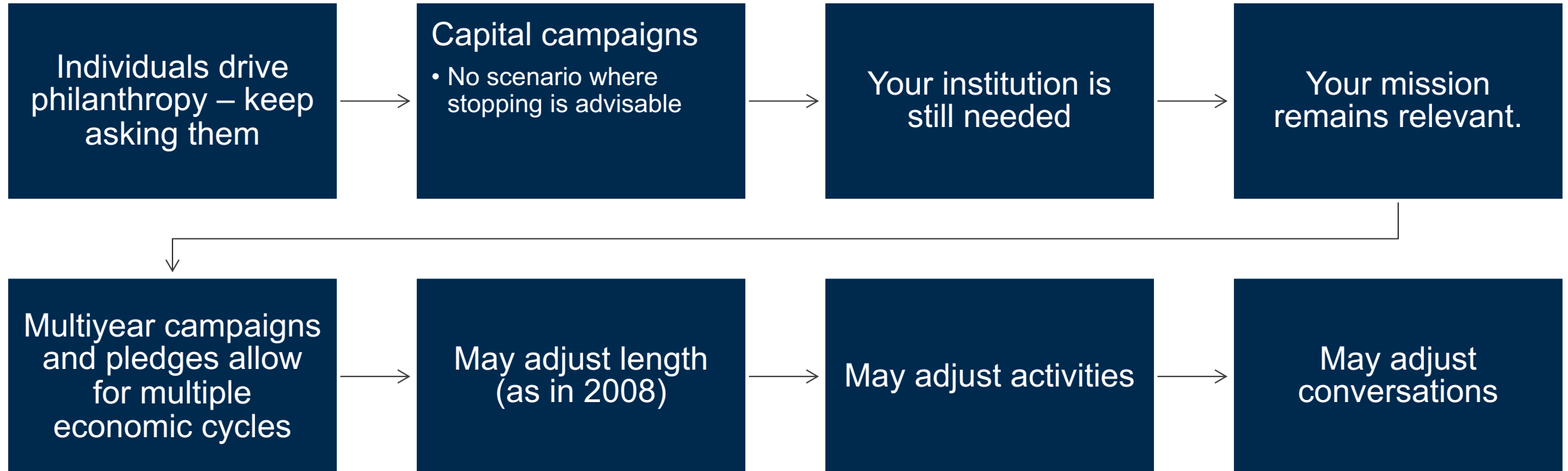
An institution needs to create immediate and mid-term timetable.

Immediate and near-time impact will be more profound.  
Proceed with fundraising with sensitivity – message and timing.

Work hard to stay among the “top 3” of charities your donors support

# 6 Week Axioms

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# Leadership Outreach

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TEMPERATURE



CONVERSATIONS



DIRECTION

# Communication and Messaging

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## Channels

From letter to video



## Who?

You?  
Who else?...



## Messaging – “The Power of Three”

About them  
About yourself  
About the Institution



## Leave them with inspiration



## Leadership today

# Enduring Communication Principles

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Inspire – inform –  
reassure



Be authentic – tell a  
true story



Do not use humor



Do not make your  
situation sound  
worse than the virus



Be careful about  
tone and style



Adjust the cadence



# Outreach to Others

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➤ *Message, Tone, Method will Vary*



## **Board members**

Insiders  
Frequent communication  
Solicitation, *if appropriate*



## **Key volunteers and other supporters**

Let them know they are important to you



## **Campaign Cabinet**

Send e-mail apprising them of strategy  
Check-in with a call  
Some may be part of stewardship calls or hand notes

# 30-60-90 Days

## Best practices prevail...strengthen them

- Segment
- Tailor approach and message
- Identify donors who need the most attention
- Cultivate...communicate...steward
  - TAKE THE TIME TO DO WHAT YOU “NEVER HAVE TIME FOR”
- Listen the gift

## 90 Days = End of fiscal year

- Review the plan – adjust for greatest impact
- LYBUNTS/SYBUNTS
- Qualify existing prospects
- Identify new major gift prospects
- Annual appeal – re-cast/re-message/new mediums

# Your Capital Campaign

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You are either:

- Considering
- Conducting
- Collecting

Action depends on the stage:

- Stay the course – use time for relationship-building
- Studies? – they are working
- Silent phase may be extended
- Timing of public phase announcement
- Reprioritize case elements, as appropriate

Why continue?

- Your mission is relevant
- Your needs haven't disappeared

# Campaign Strategies



## Maintain your donors' interest

A donor's situation may have changed  
Explore different ways they might give (e.g. planned giving)



## Leaders define themselves



## Case adjustment

Donor-centric  
Told in compelling terms  
Use strategic conversations to uncover messaging gems



## Give board and cabinet members menu of ways to cultivate and ask

# 95/5 Principle – Spend Time with Impact Prospects

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- Review major gift prospects/donors and segment for personal outreach
  - Calls – revolving list of names from your chief development officer – 1 or 2 calls/day or more?
    - Quality conversation - 3 points:
      - Ask them how they're doing – LISTEN
      - Express gratitude – “You’ve always been there for us”
      - Transition to other topics (e.g. the school)
        - Make it personal
        - Their response matters for next steps
          - » Appropriate follow-up
  - Group think...Debrief with staff and others
  - Don't be surprised if they ask, “Can I help?”

# How can I ask for a gift? - Don't prejudge

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For prospects who have already been asked, for prospects who are ready to be asked

Take their temperature

Ask for permission to discuss their support

- “Is it OK to discuss your gift?...but from those who know you already.
- Do they have the materials they need for the discussion? Negotiate as you would for an in-person solicitation
  - Length of pledge, timing of first payment, gift vehicle, initial commitment, and revisit later
- An upside of asking over Zoom...people have gotten more accustomed to it.

Don't change your mission...it needs to remain relevant.

# Other Operational Methods - 1



Mission and faith-focused



Institutional financial shift (e.g. student enrollment, scholarships) informs appeal



Scrub database

*Conduct detailed prospect research  
What new or increased donors will emerge?*



Virtual or postponed special events

## Other Operational Methods - 2



Monthly giving program – difficult to “opt out”

Sustaining support  
Younger generations



Planned Gifts

Endowment impact  
Key component of a comprehensive development program



Do something NOW that was scheduled for later

Drafts of materials or publications



Review 120+ days out to adjust plan

Donor retention  
Counter vulnerable activities



## Recommendations from Giving USA Foundation & The Lilly Family School of Philanthropy

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### **Monitor new developments:**

Short-term vs. longer-term impact



### **Nonprofit leaders and fundraisers:**

Understand and respond to change  
How do they affect your institution's giving?



### **Recovery and success will depend upon:**

How institutions manage themselves  
Strong leadership and confident  
implementation of new strategies and  
methods

# Innovate

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BEST VERSION OF  
YOURSELF



SATISFY DONOR  
INTENT

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Q & A

*TAKE CARE OF YOURSELF*

# Thank You!

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